

## Module 7

### Chapter 3

## Managing Enrollments, Attendance, and Cancellations

### Chapter Overview

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**Introduction** This chapter explains the process of managing enrollments, attendance, and cancellations in OTA.

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#### Chapter Contents

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#### See Also



#### In this Module:

Overview

    Section: Querying OTA Windows

    Chapter 1, Completing the Training Request Form

    Chapter 2, Defining an Activity

    Section: Scheduling an Event

    Chapter 4, Exporting Retrieved Data

Module 4, Staffing in the DCPDS

    Chapter 2, Building An External User

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# Enrolling an Employee

## Purpose

- This section guides you through the steps to set up and enter student enrollments for Events using status to track enrollments, to enter multiple enrollments, and to make mass updates.
- Enrolling an employee is the action that follows Scheduling an Event.

## Before You Begin

- You should access the **Search for Event** window on the **Navigation List** through *Enrollments*. Although you can access **Event Search** through *Events*, the remaining windows will not display.
- If you have accessed the **Search for Event** and **Enrollment Summary** windows to locate an Event and review enrollments, you can later go directly to the **Enrollment Details** window. Exit the first two windows without doing a query, open the **Enrollment Details** window and with your cursor in the *Event Title* data field, click the LOV. Select the Event you need. **Or use the <Functions> key to navigate between windows.**
- The system tells you when you've reached the maximum number of enrollments.
- If you have more requested enrollments than available quotas, you need to decide which enrollments to place and which to put on a waiting list in case of cancellations.
- Booking priorities for civilian training are those defined by DoD and include:
  - Critical/Mandated
  - Essential
  - Recommended
- You can enroll students into events in advance or retrospectively by changing the enrollment date(s) in the Scheduled Events window.
- The system does not allow you to enroll the same student twice.

**Example:** If you have a scheduled event running from 05 to 08 January 2001, with enrollment dates from 01 December 2000 to 31 December 2000 and you want to enroll a student today (10 July 2000), change the enrollment start date to 10 July 2000.

- The <**History**> Taskflow button on the **Enrollment Details** window tells you which Events the employee has completed and is currently enrolled in.



**Note:** You cannot change the enrollment date in the **Enrollments Details** window. The enrollment start date must be changed on the **Scheduled Event** window.

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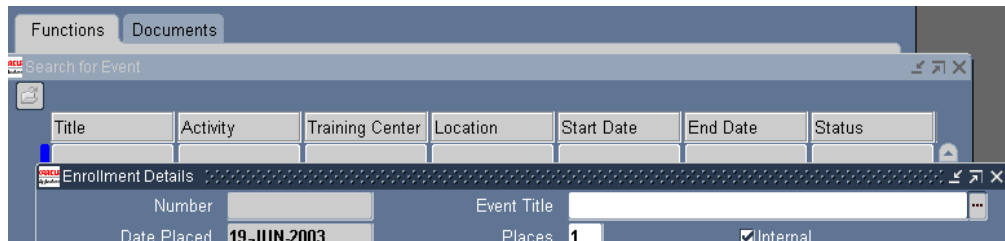
## Enrolling an Employee, Continued

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### Cascading OTA Windows

- When you make a selection from the **Navigation List**, all windows needed for a procedure display in cascaded order on your screen. Start with the top window and when you finish each window, exit to the next window.
- If you work from the top window and exit each time, all windows needed for the action are in sequential order.

Example:



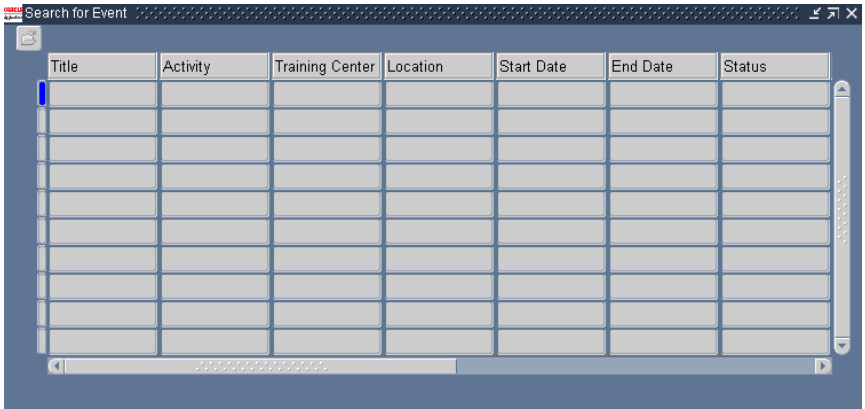

- If you need to toggle to another window, click the **<Functions>** Taskflow button on the Enrollment Summary or Enrollment Details windows. You may want to use this feature if you are enrolling employees and want to check the roster or if you are enrolling students in a number of different events.

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## Enrolling an Employee, Continued


### Searching for an Event

Step	Action																
1	<b>Navigation Path</b> → <i>Enrollments</i> → <i>Student</i> → <b>&lt;Open&gt;</b> .																
2	<p>The <b>Search for Event</b> window opens with seven columns and two checkboxes.</p> <p><b>Example:</b></p>   <p>Use the bottom scroll bar to review the checkboxes.</p> <table border="1"> <thead> <tr> <th>Data Fields and Boxes</th><th>Description</th></tr> </thead> <tbody> <tr> <td><b>Title</b></td><td>A system-generated number or name you have assigned.</td></tr> <tr> <td><b>Activity</b></td><td>Self-explanatory.</td></tr> <tr> <td><b>Training Center</b></td><td>Sponsoring location.</td></tr> <tr> <td><b>Location</b></td><td>Geographic location code.</td></tr> <tr> <td><b>Start Date</b></td><td>Self-explanatory.</td></tr> <tr> <td><b>End Date</b></td><td>Self-explanatory.</td></tr> <tr> <td><b>Status</b></td><td>Self-explanatory.</td></tr> </tbody> </table>	Data Fields and Boxes	Description	<b>Title</b>	A system-generated number or name you have assigned.	<b>Activity</b>	Self-explanatory.	<b>Training Center</b>	Sponsoring location.	<b>Location</b>	Geographic location code.	<b>Start Date</b>	Self-explanatory.	<b>End Date</b>	Self-explanatory.	<b>Status</b>	Self-explanatory.
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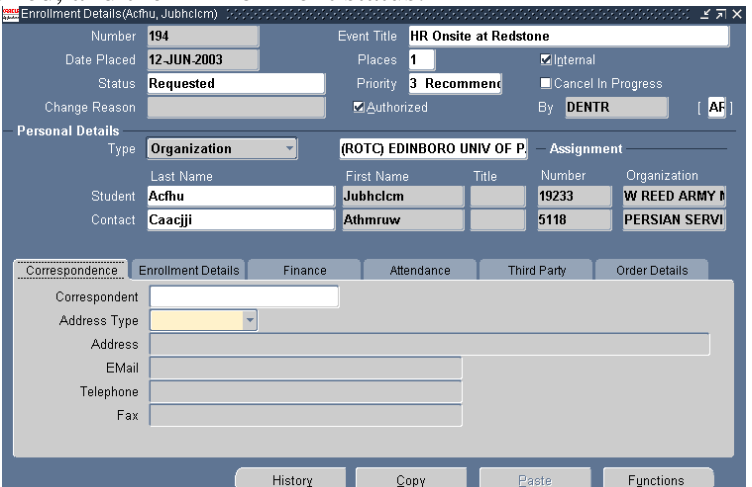
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## Enrolling an Employee, Continued

### Event (continued)

Step	Action												
2 (cont)	<table> <tr> <th>Data Fields and Boxes</th><th>Description</th></tr> <tr> <td>Status</td><td>Status of Enrollment such as Normal, Placed, Completed.</td></tr> <tr> <td>Standard Price</td><td>Cost per student enrollee.</td></tr> <tr> <td>Enrolling Checkbox</td><td>If selected, enrollment is open.</td></tr> <tr> <td>Secure Checkbox</td><td>If selected, enrollment is limited to the organization sponsoring it.</td></tr> <tr> <td>DDF</td><td>Opens Agency Group code, i.e., AF for AF. Click to open the Additional Event Information.</td></tr> </table>	Data Fields and Boxes	Description	Status	Status of Enrollment such as Normal, Placed, Completed.	Standard Price	Cost per student enrollee.	Enrolling Checkbox	If selected, enrollment is open.	Secure Checkbox	If selected, enrollment is limited to the organization sponsoring it.	DDF	Opens Agency Group code, i.e., AF for AF. Click to open the Additional Event Information.
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3 	<p>Query the <b>Search for Event</b> window for the Event you need, place the Record Indicator on the Event Title, and exit the window.</p> <p><b>Note:</b> The Enrolling Checkbox will tell you if the Event is still open for enrollment.</p>												

### Using the Enrollment Summary

Step	Action
1	<p>The <b>Enrollment Details</b> window opens the Event, any students enrolled, and their Enrollment status:</p> 

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## Enrolling an Employee, Continued

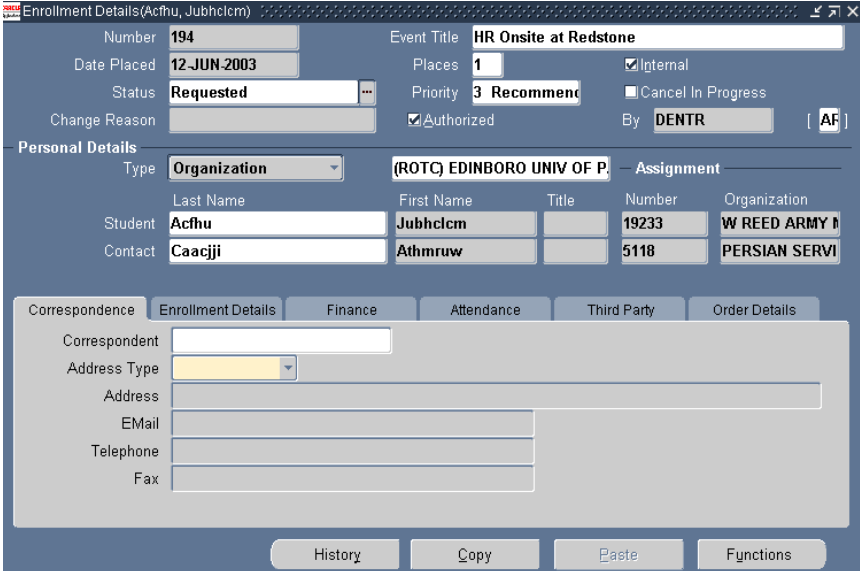
### Using the Enrollment Summary (continued)

Step	Action																												
1 (cont)	<p>Click the alternate Regions tabs to review remaining forms</p> <table> <tr> <th>Data Fields and Buttons</th><th>Description/Action</th></tr> <tr> <td>Number</td><td>System-generated <b>once you click Save.</b></td></tr> <tr> <td>Company</td><td></td></tr> <tr> <td>Event</td><td>The one you selected.</td></tr> <tr> <td>Student</td><td>Self-explanatory.</td></tr> <tr> <td>Enrollment Status</td><td>Placed, Requested, etc.</td></tr> <tr> <td>Source</td><td></td></tr> <tr> <td>Delegate Asg Org</td><td>Organization the student is assigned to.</td></tr> <tr> <td>Delegate Asg Num</td><td>System-generated.</td></tr> <tr> <td>Sponsor Asg Num</td><td>Organization sponsoring the Event.</td></tr> <tr> <td>Select All Button</td><td>Grayed out, used in mass updating.</td></tr> <tr> <td>Deselect All Button</td><td>Grayed out, used in mass updating.</td></tr> <tr> <td>Mass Update Button</td><td>Used to update more than one nomination.</td></tr> <tr> <td>Functions Button</td><td>Use to toggle to other windows; i.e. click on <b>Event Search</b> to return to that window or click <b>New Enrollment</b> to go to a blank window.</td></tr> </table>	Data Fields and Buttons	Description/Action	Number	System-generated <b>once you click Save.</b>	Company		Event	The one you selected.	Student	Self-explanatory.	Enrollment Status	Placed, Requested, etc.	Source		Delegate Asg Org	Organization the student is assigned to.	Delegate Asg Num	System-generated.	Sponsor Asg Num	Organization sponsoring the Event.	Select All Button	Grayed out, used in mass updating.	Deselect All Button	Grayed out, used in mass updating.	Mass Update Button	Used to update more than one nomination.	Functions Button	Use to toggle to other windows; i.e. click on <b>Event Search</b> to return to that window or click <b>New Enrollment</b> to go to a blank window.
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2	Exit the window. The <b>Enrollment Details</b> window opens.																												

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## Enrolling an Employee, Continued

### Completing the Enrollment Details Window

Step	Action																						
1	<p>With the cursor in the <b>Status</b> data field, complete the following:</p> 																						
	<table> <tr> <th>Data Field</th><th>Description/Action</th></tr> <tr> <td><b>Number</b></td><td>Do not use. System generated number which opens when you-open the window after saving. Future use with Finance.</td></tr> <tr> <td><b>Date Placed</b></td><td>Auto-populates from Event.</td></tr> <tr> <td><b>Status</b></td><td>Click the LOV. (Placed, waitlisted, etc.)</td></tr> <tr> <td><b>Change Reason</b></td><td>Grayed out; opens when Status is changed</td></tr> <tr> <td><b>Event Title</b></td><td>Auto-populates from Event.</td></tr> <tr> <td><b>Places</b></td><td>Defaults to 1. Not used at this time.</td></tr> <tr> <td><b>Priority</b></td><td>Click the LOV. (1, 2, 3, or 0)</td></tr> <tr> <td><b>Internal Checkbox</b></td><td>Not used by DoD.</td></tr> <tr> <td><b>Authorized Checkbox</b></td><td>Select the checkbox.</td></tr> <tr> <td><b>By</b></td><td>Auto-populates with name of authorized person enrolling the employee.</td></tr> </table>	Data Field	Description/Action	<b>Number</b>	Do not use. System generated number which opens when you-open the window after saving. Future use with Finance.	<b>Date Placed</b>	Auto-populates from Event.	<b>Status</b>	Click the LOV. (Placed, waitlisted, etc.)	<b>Change Reason</b>	Grayed out; opens when Status is changed	<b>Event Title</b>	Auto-populates from Event.	<b>Places</b>	Defaults to 1. Not used at this time.	<b>Priority</b>	Click the LOV. (1, 2, 3, or 0)	<b>Internal Checkbox</b>	Not used by DoD.	<b>Authorized Checkbox</b>	Select the checkbox.	<b>By</b>	Auto-populates with name of authorized person enrolling the employee.
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2	Click the Descriptive Flexfield [ ] to display the <b>Additional Delegate Booking Information</b> window.																						

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## Enrolling an Employee, Continued

### Completing Additional Delegate Booking Information

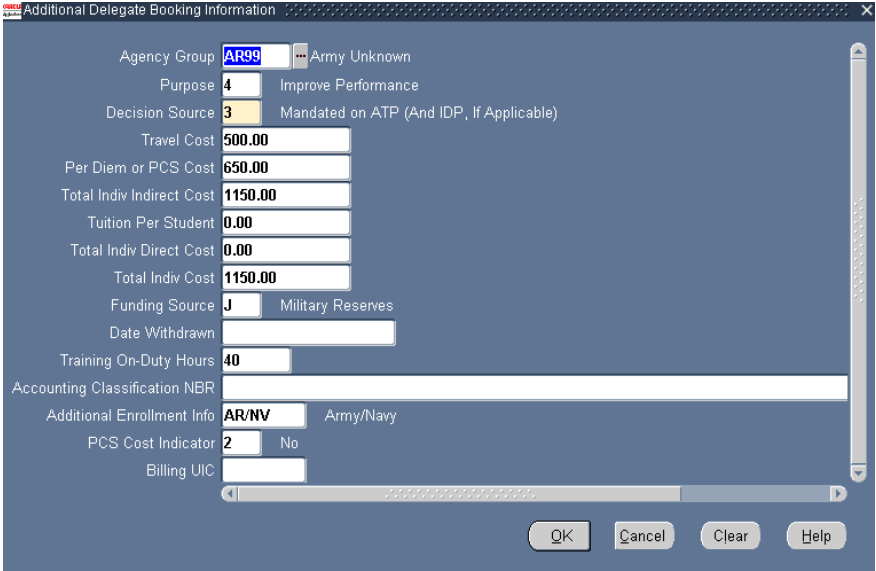
Step	Action																												
3	<p>On the <b>Additional Delegate Booking Information</b> window enter data as indicated:</p> <table> <tr> <th>Data Field</th><th>Description/Action</th></tr> <tr> <td><b>Agency Group</b></td><td>Click the LOV to populate the employee's agency. (Required)</td></tr> <tr> <td><b>Purpose</b></td><td>Click the LOV. (Required)</td></tr> <tr> <td><b>Travel Cost</b></td><td>Type in the dollar amount; will vary by student.</td></tr> <tr> <td><b>Per Diem or PCS Cost</b></td><td>Type in the dollar amount.</td></tr> <tr> <td><b>Total Indiv Indirect Cost</b></td><td>System totals travel and per diem costs.</td></tr> <tr> <td><b>Total Indiv Direct Cost</b></td><td>Type in dollar amount – may vary by student.</td></tr> <tr> <td><b>Total Indiv Cost</b></td><td>System totals cost.</td></tr> <tr> <td><b>Date Withdrawn</b></td><td>Input date when student does not complete the Event.</td></tr> <tr> <td><b>Billing UIC</b></td><td>NV use. (Required)</td></tr> <tr> <td><b>Training On-Duty Hours</b></td><td>Type in number of hours. (Required)</td></tr> <tr> <td><b>Training Non-Duty Hours</b></td><td>Type in number of hours.</td></tr> <tr> <td><b>Accounting Classification NBR</b></td><td>Type in free form up to 120 characters. This should not be used for Purchase card information as it is not secure.</td></tr> <tr> <td><b>Additional Enrollment Info</b></td><td>Click the LOV. (AF/NV use only)</td></tr> </table>	Data Field	Description/Action	<b>Agency Group</b>	Click the LOV to populate the employee's agency. (Required)	<b>Purpose</b>	Click the LOV. (Required)	<b>Travel Cost</b>	Type in the dollar amount; will vary by student.	<b>Per Diem or PCS Cost</b>	Type in the dollar amount.	<b>Total Indiv Indirect Cost</b>	System totals travel and per diem costs.	<b>Total Indiv Direct Cost</b>	Type in dollar amount – may vary by student.	<b>Total Indiv Cost</b>	System totals cost.	<b>Date Withdrawn</b>	Input date when student does not complete the Event.	<b>Billing UIC</b>	NV use. (Required)	<b>Training On-Duty Hours</b>	Type in number of hours. (Required)	<b>Training Non-Duty Hours</b>	Type in number of hours.	<b>Accounting Classification NBR</b>	Type in free form up to 120 characters. This should not be used for Purchase card information as it is not secure.	<b>Additional Enrollment Info</b>	Click the LOV. (AF/NV use only)
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## Enrolling an Employee, Continued







### Completing Additional Delegate Booking Information (continued)

Step	Action
3	<p>Click the &lt;OK&gt; button.</p> <p>Example of a completed window:</p> 
4	The <b>Enrollment Details</b> window opens with the top region completed.

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## Enrolling an Employee, Continued

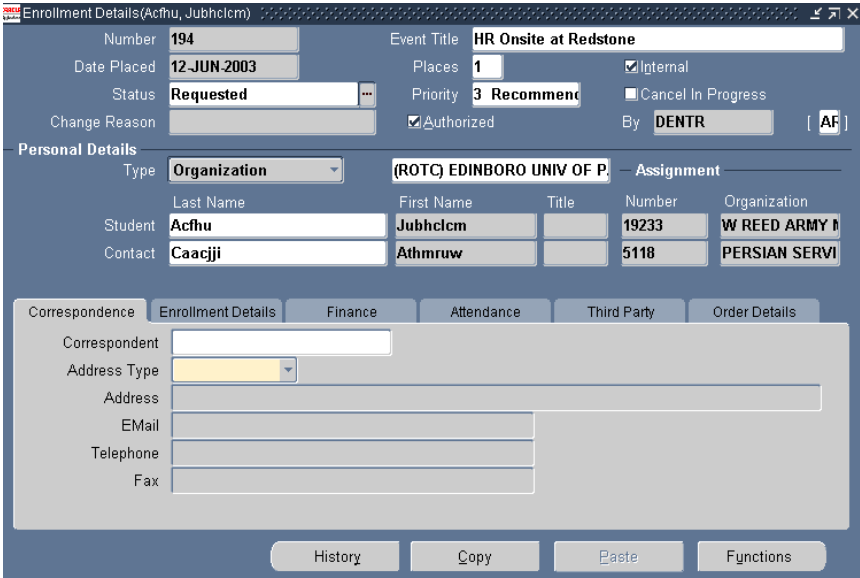
### Continuing the Enrollment Details Window

Step	Action																						
5	<p>In the <b>Enrollment Details</b> window, complete the data fields for the <b>Personal Details</b> Region:</p> <table> <tr> <th>Data Fields and Taskflow Buttons</th><th>Description/Action</th></tr> <tr> <td> <b>Type</b>    </td><td> The drop-down menu defaults to Organization.   <b>Note:</b> The other choice is <i>Customer</i> (reserved for contract or military personnel). </td></tr> <tr> <td><b>Organization Assignment</b></td><td>Click the LOV and use the reduction criteria to select needed agency. This narrows the search for names.</td></tr> <tr> <td><b>Student</b></td><td>Click the LOV to select the name; remaining fields populate with organization assignment.</td></tr> <tr> <td> <b>Contact</b>    </td><td> Click the LOV to select the name, remaining fields populate. Required field.   <b>Note:</b> Must be a supervisor, Training Monitor, or person with a Civilian Inbox. The Course Evaluation can then be forwarded to one of their inboxes in lieu of email when the employee has no access to the system. </td></tr> <tr> <td><b>Correspondence</b></td><td>Click the drop-down menu; select Correspondence. (optional)</td></tr> <tr> <td><b>Correspondent</b></td><td>Click the LOV. (optional)</td></tr> <tr> <td><b>Address Type</b></td><td>Click "External" for home address or "Internal" for work address. The remaining portion populates when the organization is selected and will be used for student notifications. (optional) See Chapter 5 on Letters.</td></tr> <tr> <td><b>Email</b></td><td>Type in address. (optional)</td></tr> <tr> <td><b>Telephone</b></td><td>Type in number. (optional)</td></tr> <tr> <td><b>Fax</b></td><td>Type in number. (optional)</td></tr> </table>	Data Fields and Taskflow Buttons	Description/Action	<b>Type</b>  	The drop-down menu defaults to Organization.  <b>Note:</b> The other choice is <i>Customer</i> (reserved for contract or military personnel).	<b>Organization Assignment</b>	Click the LOV and use the reduction criteria to select needed agency. This narrows the search for names.	<b>Student</b>	Click the LOV to select the name; remaining fields populate with organization assignment.	<b>Contact</b>  	Click the LOV to select the name, remaining fields populate. Required field.  <b>Note:</b> Must be a supervisor, Training Monitor, or person with a Civilian Inbox. The Course Evaluation can then be forwarded to one of their inboxes in lieu of email when the employee has no access to the system.	<b>Correspondence</b>	Click the drop-down menu; select Correspondence. (optional)	<b>Correspondent</b>	Click the LOV. (optional)	<b>Address Type</b>	Click "External" for home address or "Internal" for work address. The remaining portion populates when the organization is selected and will be used for student notifications. (optional) See Chapter 5 on Letters.	<b>Email</b>	Type in address. (optional)	<b>Telephone</b>	Type in number. (optional)	<b>Fax</b>	Type in number. (optional)
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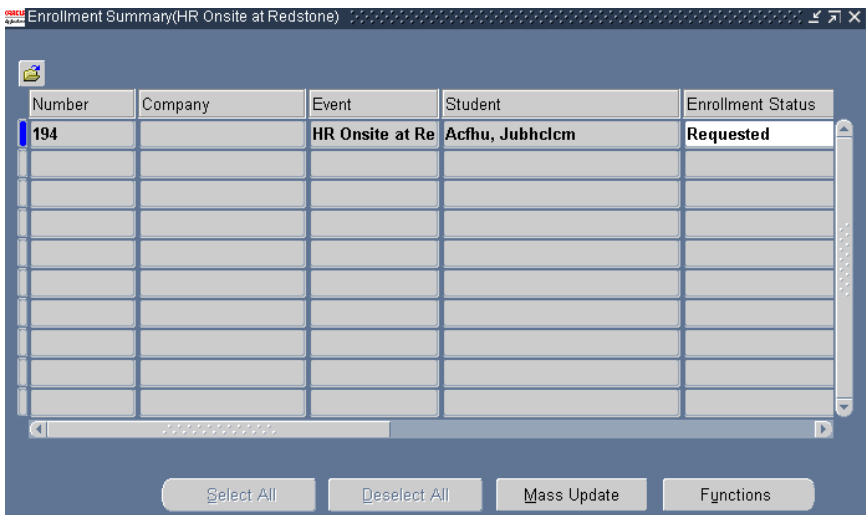
## Enrolling an Employee, Continued

### Continuing the Enrollment Details Window (continued)

Step	Action										
5 (cont)	<table border="1"> <thead> <tr> <th>Data Fields and Taskflow Buttons</th><th>Description/Action</th></tr> </thead> <tbody> <tr> <td>&lt;History&gt;</td><td>Opens the <b>Student Enrollment History</b> window of pending or completed Events.</td></tr> <tr> <td>&lt;Copy&gt;</td><td>Under development.</td></tr> <tr> <td>&lt;Paste&gt;</td><td>Grayed out.</td></tr> <tr> <td>&lt;Functions&gt;</td><td>Use to toggle from window to window.</td></tr> </tbody> </table>	Data Fields and Taskflow Buttons	Description/Action	<History>	Opens the <b>Student Enrollment History</b> window of pending or completed Events.	<Copy>	Under development.	<Paste>	Grayed out.	<Functions>	Use to toggle from window to window.
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<Functions>	Use to toggle from window to window.										
6	<p>Click Save. The student's name appears on the window title.</p> <p><b>Example:</b></p> 										
7	Your employee is enrolled. Exit the window.										

## Verifying Enrollments

### Verifying Enrollments

Step	Action
1	Click <b>&lt;Functions&gt;</b> to toggle back to the <b>Enrollment Summary</b> window.
2	<p>It opens with the names of the Students, Enrollment Status, etc. Once you have verified the information as correct, download the names into a course roster, change any student enrollment status as needed, click the <b>&lt;Functions&gt;</b> button to go back to the <b>Enrollment Details</b> window and enroll additional students.</p> 

### Entering Additional Enrollments

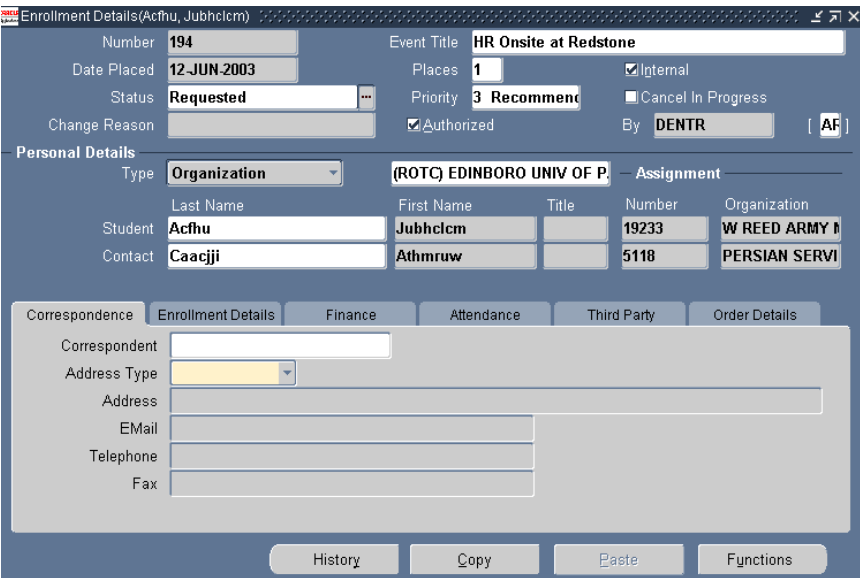

If you are updating several enrollments with the same data item, such as changing their status, or rolling them forward onto a new Event, you can make additional updates in the **Enrollment Summary** window.

Step	Action
1	<b>Navigation Path</b> → <i>Enrollment</i> → <i>Student</i> → <b>&lt;Open&gt;</b> .
2	The <b>Search for Event</b> window opens. Query for the Event. With the <i>Current Record Indicator</i> on the Event you need, exit the window.
3	<p>The <b>Enrollment Summary</b> window opens with the selected Event and Status of each student. If correct, exit the window.</p> <p><b>Note:</b> The system refresh (F11) puts student names in alpha order regardless of the Enrollment Status. Use the Folder Tools Palette to sort by status, if needed, as described in Chapter 2.</p>

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## Entering Additional Enrollments, Continued

### Entering Multiple Enrollments (continued)

Step	Action
4	<p>The <b>Enrollment Details</b> window opens with the selected Event.</p> 
5	<p>Click new record  on Toolbar. A blank <b>Enrollment Details</b> window opens.</p>
6	<p>With your cursor in each needed data field in the top region, press F3. This duplicates the previous entry. The DDF will not duplicate but must be completed separately.</p>
7	<p>Click <b>F3</b> to populate the <b>Organization</b>, then click the <b>LOV</b> to select student name and contact in the <b>Personal Details</b> Region.</p>
8	<p>Click Save. Repeat the action to enroll the next employee.</p>

## Mass Updating Enrollments

### Before you Begin

- You can do a mass update of the priority request to the status Placed, and issue a standard confirmation letter. You can do a mass update of the remaining request to the status Waitlisted, and issue a standard waiting list letter.
- If a placed student cancels, you can choose the highest priority Waitlisted student to fill the vacancy. You can do a mass update of all Waitlisted students to roll them over to the next scheduled Event for the Activity.

### Mass Updating Enrollments Decision Table

Use the priority levels you entered for the enrollment for mass updating. Use the following decision table to help with your levels.

If...	Then...
You previously entered more Enrollments than available quotas	<ul style="list-style-type: none"> <li>• You can use the priority levels to decide which enrollments to place and which to put on a waiting list in case of cancellations.</li> <li>• You can do a mass update of the priority requests to the status Placed and issue a standard confirmation letter.</li> <li>• You can do a mass update of the remaining requests to the status Waitlisted and issue a standard waiting list letter.</li> </ul>
A placed student cancels	<ul style="list-style-type: none"> <li>• You can choose the highest priority waitlisted student to fill quota.</li> <li>• You can do a mass update of all waitlisted students to roll them over to the next scheduled Event for the activity.</li> </ul>

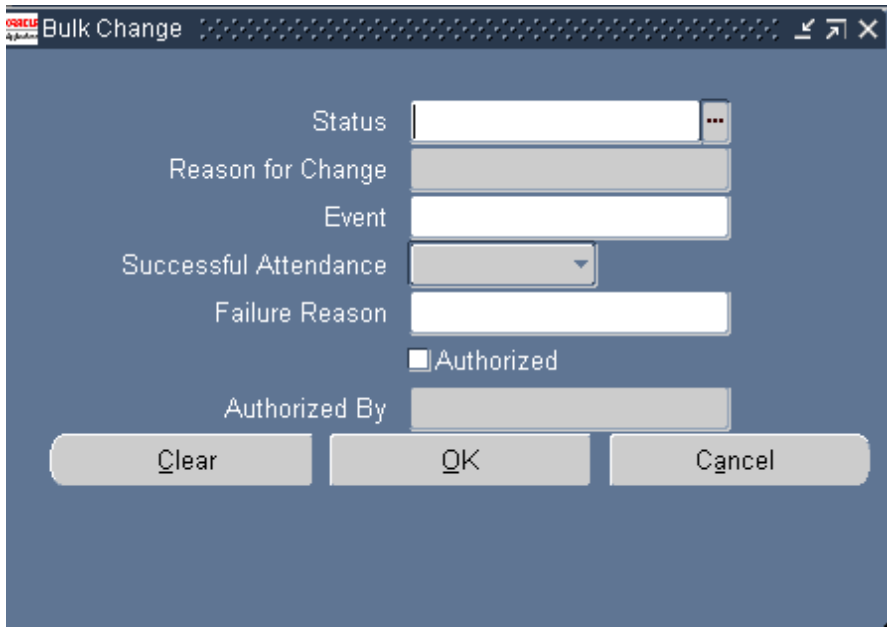
### Mass Updating Enrollments

Step	Action
1	<b>Navigation Path</b> → <i>Enrollment</i> → <i>Student</i> → <b>&lt;Open&gt;</b> .
2	The <b>Search for Event</b> window opens. Query for the Event you wish to mass enroll. Exit the window.

*Continued on next page*

## Mass Updating Enrollments, Continued

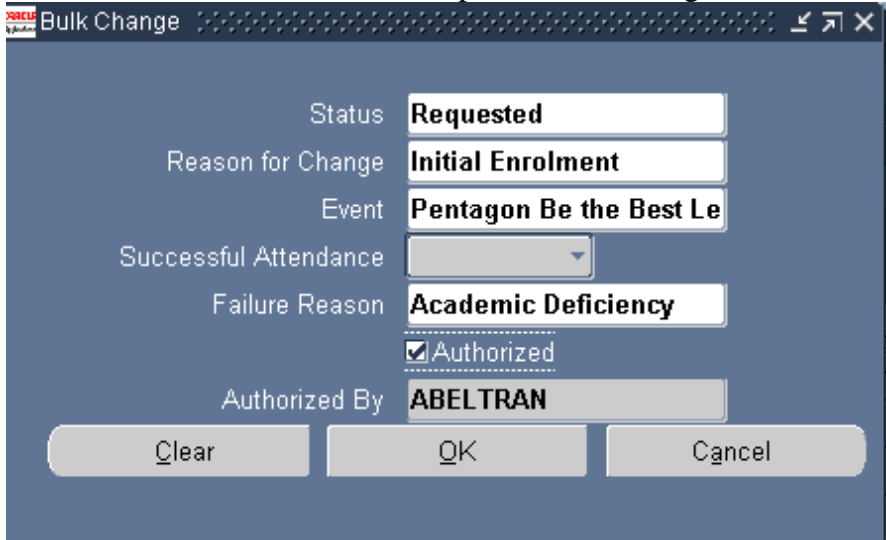
### Mass Updating Enrollments (continued)

Step	Action
3	The <b>Enrollment Summary</b> window opens. Click the correct Event and click the <b>&lt;Mass Update&gt;</b> button.
4	<p>The <b>Bulk Change</b> window opens <b>Change</b> checkbox simultaneously. Click the <b>&lt;Select All&gt;</b> button.</p> <p>Deselect the <b>Change</b> checkbox for specific enrollments you do not want to update or leave all enrollments checked if you want to update them all.</p> 
5	Click <b>&lt;Deselect All&gt;</b> if you do not want to update any enrollments for this Event.

*Continued on next page*

## Mass Updating Enrollments, Continued


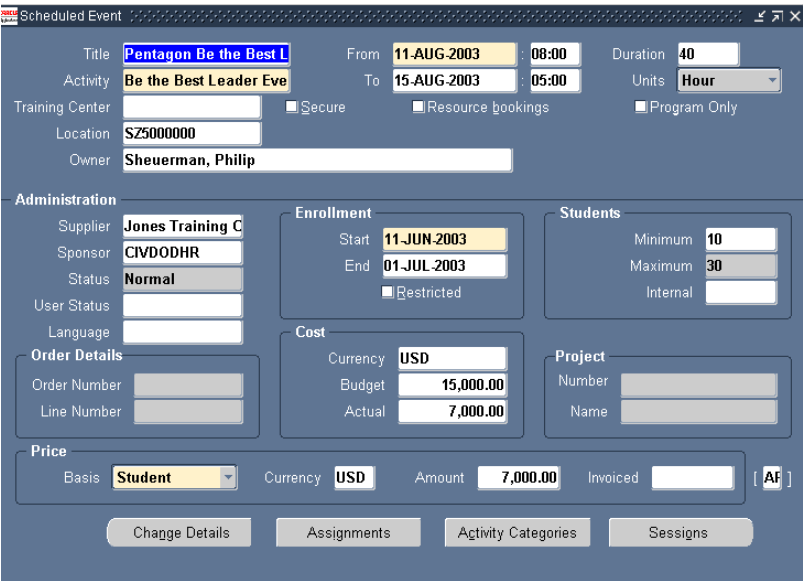

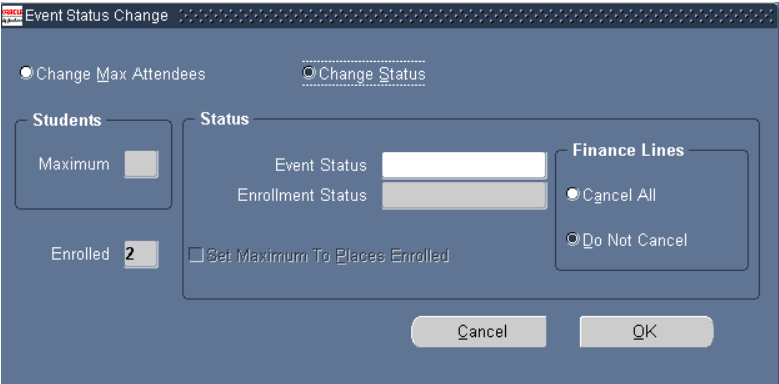
### Mass Updating Enrollments (continued)

Step	Action																
6	<p>Select the new values you want to apply in the <b>Bulk Change</b> window. Enter a new Event if you want to roll forward the enrollments into a new Event. Complete the following data fields:</p>  <p><b>Note:</b> OTA changes all the enrollment statuses en masse for you (and rolls the enrollments forward onto a new Event, if entered).</p> <table border="1"> <thead> <tr> <th>Data Fields</th><th>Description/Action</th></tr> </thead> <tbody> <tr> <td><b>Status</b></td><td>Click the LOV and select new status.</td></tr> <tr> <td><b>Reason for Change</b></td><td>Click the LOV and select reason for change.</td></tr> <tr> <td><b>Event</b></td><td>Click the LOV to select the Event.</td></tr> <tr> <td><b>Successful Attendance</b></td><td>Click “Yes” or “No” from the drop-down menu. Not used by DoD.</td></tr> <tr> <td><b>Failure Reason</b></td><td>Click the LOV and select the reason.</td></tr> <tr> <td><b>Authorized Checkbox</b></td><td>Select the checkbox.</td></tr> <tr> <td><b>Authorized By</b></td><td>Auto-populates name of person.</td></tr> </tbody> </table>	Data Fields	Description/Action	<b>Status</b>	Click the LOV and select new status.	<b>Reason for Change</b>	Click the LOV and select reason for change.	<b>Event</b>	Click the LOV to select the Event.	<b>Successful Attendance</b>	Click “Yes” or “No” from the drop-down menu. Not used by DoD.	<b>Failure Reason</b>	Click the LOV and select the reason.	<b>Authorized Checkbox</b>	Select the checkbox.	<b>Authorized By</b>	Auto-populates name of person.
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7	Click the <OK> button. The <b>Enrollment Summary</b> window opens.																
8	Exit the window.																



# Changing Maximum Attendees

## Changing Maximum Attendees

Step	Action
1	<p><b>Navigation Path</b> → <i>Events</i> → <i>Scheduled</i> → <b>&lt;Open&gt;</b>. The <b>Scheduled Event</b> window opens. Query for the Event.</p> <p> <b>Note:</b> If the <b>Secure</b> box is selected, you can only update the Event if you are assigned to the organization that is administering the Event.</p> 
2	Click <b>&lt;Change Status&gt;</b> . The <b>Event Status</b> window opens.
3	<p>Click the <b>Change Max Attendees</b> radio button and change the maximum number in the <b>Students</b> Region. The number currently enrolled opens in the box below it. Click the <b>&lt;OK&gt;</b> button.</p> <p> <b>Note:</b> You cannot reduce the maximum below the number currently enrolled with the Status <i>Placed</i> or <i>Attended</i> on the <b>Scheduled Event</b> window.</p> 

*Continued on next page*

## Changing Maximum Attendees, Continued

### Changing Maximum Attendees (continued)

Step	Action	
4	If the Event was previously Full and there is a waiting list, a pop-up box notifies you the “Waiting List Exists” and asks if you want to select a student from the waiting list.	
	<b>Click &lt;Yes&gt; to select from the Waiting List</b>	<b>Click &lt;No&gt; to save the new maximum numbers without selecting from the Waiting List</b>
	<ul style="list-style-type: none"> <li>The <b>Waitlisted Enrollment</b> window opens. (The number of vacancies for the Event appears in a box at the bottom of the window).</li> <li>Select the student you want to enroll on the Event by positioning the cursor in the <b>Booking Status</b> field and selecting <i>Placed</i> from the LOV. (This enables you to fill the spaces before someone else enters new enrollments for the Event.)</li> <li>Click <b>&lt;OK&gt;</b>.</li> </ul>	<ul style="list-style-type: none"> <li>The <b>Event Status Change</b> window opens.</li> <li>The Event status returns to Normal and you and other users can fill the spaces as normal.</li> <li>Click <b>&lt;OK&gt;</b>.</li> <li>To check the changes you have made, re-query the Event and check to see if the Maximum Number field reflects the new number.</li> </ul>
5	The Event status changes to “Full” when the maximum is reached.	

*Continued on next page*

## Double-Booking an Enrollment

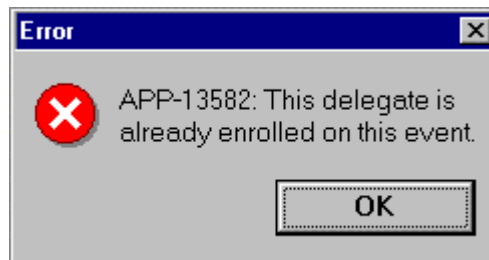
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### Double-Booking Enrollments

OTA prevents you from double-booking students with the following statuses into events:

- *Placed*
- *Attended*

A message box opens which indicates the employee is already enrolled:



However, OTA does not prevent you double-booking students with the following statuses into events:

- *Requested*
- *Waitlisted*
- *Cancelled*



It assumes that until a student is Placed or has Attended an event, you can book them into another, clashing event. This provides you with some flexibility in the way you define and manage booking students into events.



**Note:** OTA only checks for double-bookings when the status of the event is *Confirmed*. This enables you to double-book students while you are planning an event and, perhaps, testing various event date scenarios.

---

## Canceling an Enrollment

<b>Purpose</b>	This procedure will guide you through the steps to cancel an enrollment.
<b>See Also</b> 	In this module: Chapter 2, Administering Training Sections: Defining an Activity Scheduling an Event/Session
<b>Who Does This</b>	 Components will determine who will have this responsibility.
<b>Before You Begin</b>	<ul style="list-style-type: none"> <li>• If the Event was previously <b>Full</b> and there is a waiting list, the system opens a pop up box notifying you the “waiting list exists” and asks if you want to select a student from the waiting list.</li> <li>• The system also advises you if the Event has reached or exceeded its maximum number of student enrollments.</li> <li>• When you cancel an Event, OTA automatically cancels all enrollments.</li> </ul>

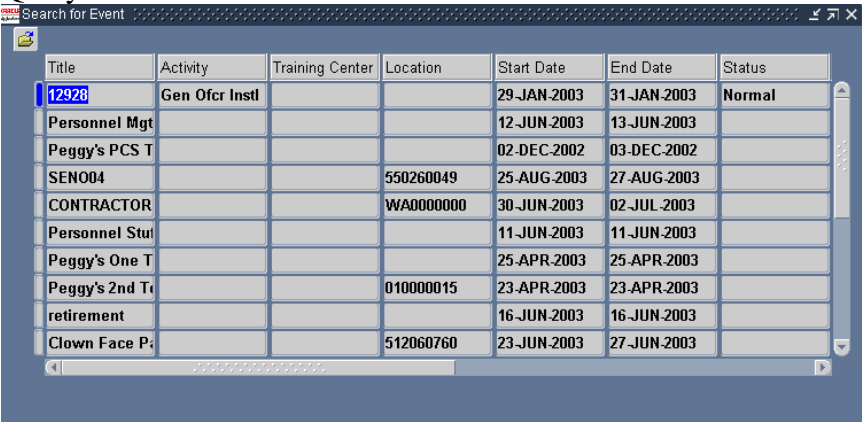

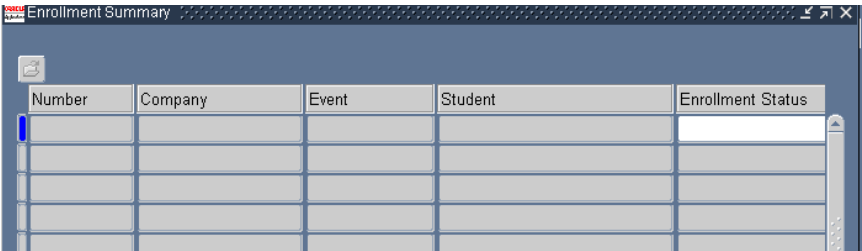
### Canceling an Enrollment

Step	Action
1	<b>Navigation Path</b> → <i>Enrollments</i> → <i>Student</i> → <Open>.
2	The <b>Search for Event</b> window opens.

*Continued on next page*

## Canceling an Enrollment, Continued

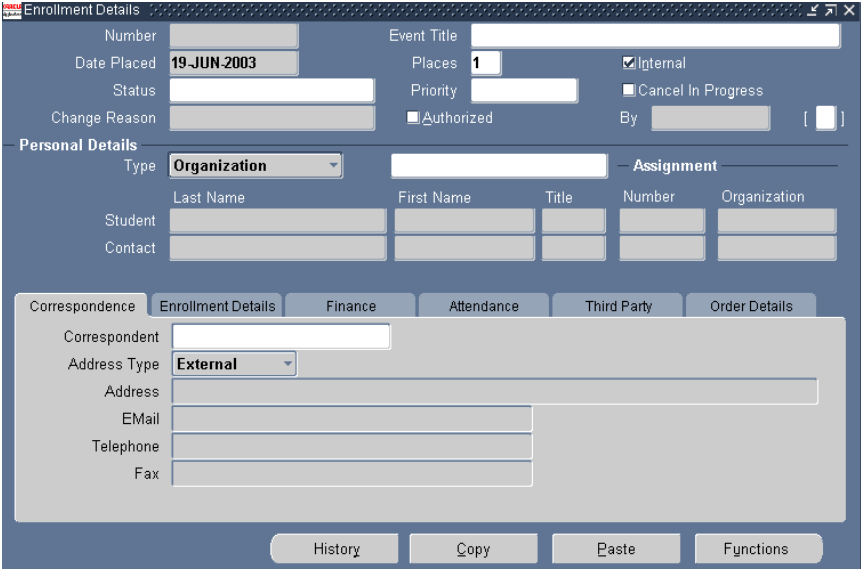

### Canceling an Enrollment (Continued)

Step	Action
3	<p>Query for the Event.</p>  <p>Use the bottom scroll bar to review the remaining columns and checkboxes.</p> 
4	With the <b>Current Record Indicator</b> on the selected Event, exit the window.
5	<p>The <b>Enrollment Summary</b> window opens.</p> <p>Move the <b>Current Record Indicator</b> to the Event (student) you wish to cancel and exit the window.</p> 
6	With the cursor in the Enrollment status column, click the LOV and select "Cancelled."
7	Click Save and exit the window.

*Continued on next page*

## Canceling an Enrollment, Continued

### Canceling an Enrollment (Continued)

Step	Action
8	<p>The <b>Enrollment Details</b> window opens with the enrollee's name next to the window name.</p> <p>The <b>Status</b> data field opens with Cancelled. Exit the window.</p>  <p> <b>Note:</b> If the Event was previously Full and there is a waiting list, a pop-up box notifies you the Waiting List Exists and asks if you want to select from it.</p>

# Building External Students

## Purpose

This section will guide you through the process of building “external” students – those personnel who may attend your training but are not in your database. Examples might be military personnel, contract employees, or employees from city or state who share mutual training needs.

## Who Has Access



Components will determine who will be assigned the role of External User.

## Before You Begin

- You must be in the Role of External User to build an External Student.
- A numbering **or naming** convention for Social Security number would assist in identifying external students for reporting purposes, i.e., begin all with “888” or another number **or type names in all caps**.
- External Students will not be able to process TRFs or other personnel actions. See Module 4, Chap 2, Building an External User for further information.

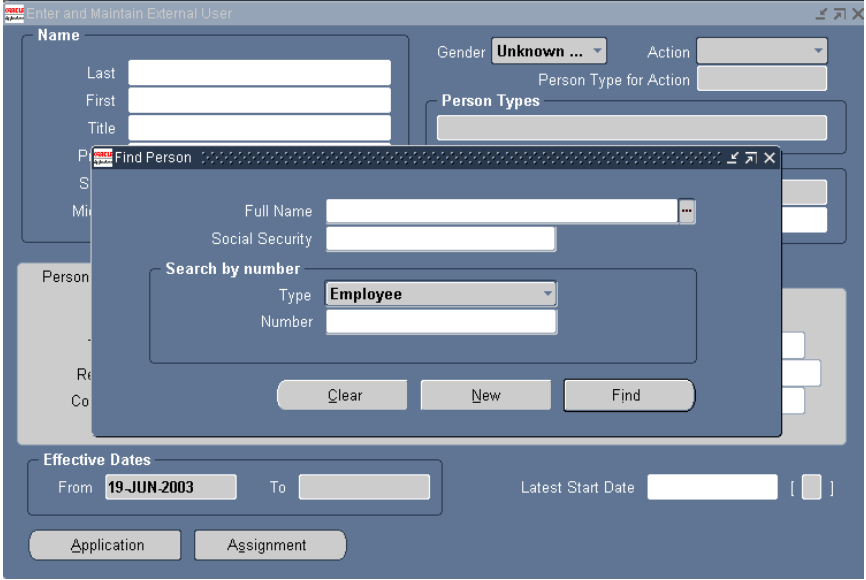
## Building External Students

Step	Action																														
1	On the Responsibilities window, select CIVDOD External User.																														
2	On the Navigator window, select <i>Employee Enter and Maintain</i> . <div data-bbox="665 1297 1271 1835" data-label="Image"> <p>The screenshot shows a window titled 'Responsibilities' with a search bar at the top. Below the search bar is a list of responsibilities and their corresponding security groups. The list is as follows:</p> <table border="1"> <thead> <tr> <th>Responsibility</th> <th>Security Group</th> </tr> </thead> <tbody> <tr> <td>CIVDOD EEO Specialist</td> <td>Standard</td> </tr> <tr> <td><b>CIVDOD External Users</b></td> <td><b>Standard</b></td> </tr> <tr> <td>CIVDOD LN HR MGR</td> <td>Standard</td> </tr> <tr> <td>CIVDOD LN Reconstruct History</td> <td>Standard</td> </tr> <tr> <td>CIVDOD NAF HR Manager (AF)</td> <td>Standard</td> </tr> <tr> <td>CIVDOD NAF HR Manager (Army)</td> <td>Standard</td> </tr> <tr> <td>CIVDOD NAF Personnelist (AF)</td> <td>Standard</td> </tr> <tr> <td>CIVDOD OTA PERSONNELIST</td> <td>Standard</td> </tr> <tr> <td>CIVDOD OTA TRN ADM</td> <td>Standard</td> </tr> <tr> <td>CIVDOD PAYROLL REGENERATION</td> <td>Standard</td> </tr> <tr> <td>CIVDOD PERSONNELIST</td> <td>Standard</td> </tr> <tr> <td>CIVDOD Reconstruct History</td> <td>Standard</td> </tr> <tr> <td>System Administrator</td> <td>Standard</td> </tr> <tr> <td>US Federal HR Manager</td> <td>Standard</td> </tr> </tbody> </table> <p>At the bottom of the window are three buttons: 'Find', 'OK', and 'Cancel'.</p> </div>	Responsibility	Security Group	CIVDOD EEO Specialist	Standard	<b>CIVDOD External Users</b>	<b>Standard</b>	CIVDOD LN HR MGR	Standard	CIVDOD LN Reconstruct History	Standard	CIVDOD NAF HR Manager (AF)	Standard	CIVDOD NAF HR Manager (Army)	Standard	CIVDOD NAF Personnelist (AF)	Standard	CIVDOD OTA PERSONNELIST	Standard	CIVDOD OTA TRN ADM	Standard	CIVDOD PAYROLL REGENERATION	Standard	CIVDOD PERSONNELIST	Standard	CIVDOD Reconstruct History	Standard	System Administrator	Standard	US Federal HR Manager	Standard
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## Building External Students, Continued

### Building External Students (continued)

Step	Action																										
3	<p>The find person window opens click the &lt;NEW&gt; button. Enter and Maintain External User window opens. Complete the following data fields:</p> 																										
	<table> <tr> <th>Data Fields</th><th>Description/Action</th></tr> <tr> <td><b>Name Region:</b></td><td></td></tr> <tr> <td><b>Last</b></td><td>Type in last name</td></tr> <tr> <td><b>First</b></td><td>Type in first name</td></tr> <tr> <td><b>Gender Drop Down Menu:</b></td><td></td></tr> <tr> <td><b>Type</b></td><td>Click LOV and select External User</td></tr> <tr> <td><b>Hire Date</b></td><td>Current date auto-populates</td></tr> <tr> <td><b>Identification Region:</b></td><td></td></tr> <tr> <td><b>Social Security</b></td><td>Type in fictional number</td></tr> <tr> <td><b>Personal Information:</b></td><td></td></tr> <tr> <td><b>Birth Date</b></td><td>Type in fictional date</td></tr> <tr> <td><b>Age</b></td><td>Auto-populates from birth date entry</td></tr> <tr> <td><b>Effective Dates</b></td><td>Auto-populates today's date</td></tr> </table>	Data Fields	Description/Action	<b>Name Region:</b>		<b>Last</b>	Type in last name	<b>First</b>	Type in first name	<b>Gender Drop Down Menu:</b>		<b>Type</b>	Click LOV and select External User	<b>Hire Date</b>	Current date auto-populates	<b>Identification Region:</b>		<b>Social Security</b>	Type in fictional number	<b>Personal Information:</b>		<b>Birth Date</b>	Type in fictional date	<b>Age</b>	Auto-populates from birth date entry	<b>Effective Dates</b>	Auto-populates today's date
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4	Click Save. Your “external student” can now be selected from the database when you complete the enrollment process.																										